

Lawn & Garden Marketing

The merchandising magazine for lawn, garden and leisure living products.



6 **Cover Story:** High tech is no stranger to lawn and garden. Many tangible manufacturing benefits have been realized, and more are on the way. (Cover photo courtesy of Deere & Co.)



24 **Louisville Expo:** The weather cooperated, the crowds materialized and next year's show dates are set. (Related story on page 48.)

6 **High tech is here.** You may not see the manufactured results of computer-aided manufacturing, but you'll notice when high-quality equipment becomes cheaper.

24 **Louisville Expo: it worked.** Using the outdoor demonstration area as a showcase, manufacturers unveiled innovative equipment for the 1985 season.

34 **Simmons and Gallup data presented to Executive Forum.** The wide world of lawn and garden explained at the National Hardware Show.

48 **Attendance and attitudes spelled success.** The smoothness of the show and the enthusiasm of the staff turned many arriving skeptics into believers.

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Coming in October: The Changing Market for Fertilizers and Chemicals • How an Ace-Retailer-Owned Company Builds Lawn and Garden Volume • ABCs of Engine Filters

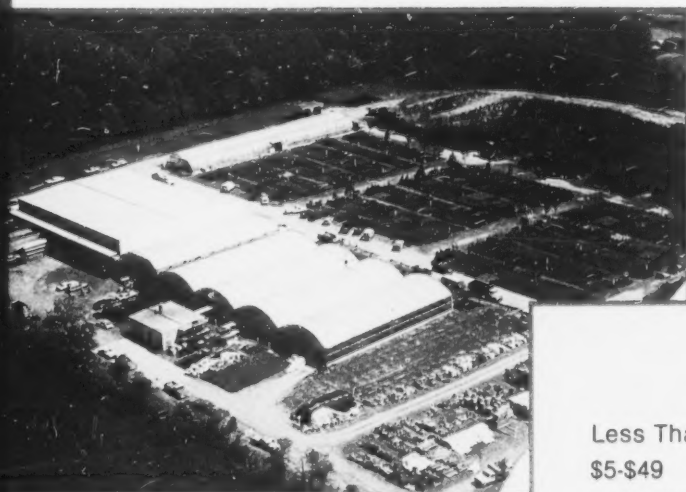
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Simmons and Gallup data presented to Executive Forum



The Weyerhaeuser/Shemin distribution center in Butonsville, MD, is one of three one-stop green goods and hardlines centers that the company operates.

■ The 1984 Growing the Market Executive Forum sponsored by **Lawn & Garden Marketing** focused on the acquisition and analysis of sales data and trends.

The data are presented here, along with an example of one company (Weyerhaeuser/Shemin) that is expanding distribution of a variety of hardlines and green goods products, based on experience and on researching consumer trends.

The Executive Forum, as in 1983, was scheduled during the National Hardware Show in Chicago. Following are highlights of the data and suggested applications as presented by the panelists.



Phil Robertson is vice president of marketing for the Custom Studies Div. of Simmons Market Research Bureau.

"Before I share some findings with you from our latest survey, I want to caution you not to use numbers the way a drunk uses a lamp post: for support, rather than illumination. Don't say, 'Wow! 54 million Americans bought flower seeds last year. We're doing great.'"

"Rather, try to understand how you can sell to millions of

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Table 1 1983 Seed Purchases

	Flower	Vegetable	Lawn
Less Than \$5	21.1 %	17.3 %	7.3 %
\$5-\$49	12.1	21.7	15.8
Total Who Bought	(33.8)	(40.0)	(24.4)

(Base: 162 Million Adults)

Source: Simmons

Table 2 1983 Fertilizer Purchases

	House-plant	Vegetable	Lawn
Less Than \$5	24.6 %	8.7 %	4.0 %
\$5-\$49	13.6	17.8	24.6 *
Total Who Bought	(38.2)	(28.0)	(33.4)
* \$20-\$49			9.5 %

Source: Simmons

**Table 3 1983 Lawn Fertilizer/
Purchaser Profile**

	Index
... Spent More Than \$20...	
— Northeast Census Region	137
— Managers & Professionals	147
— Graduated College	152
— Household Income \$40,000 or More	150

Source: Simmons

Table 4 1983 Lawn and Garden Equipment Ownership

	%
Riding Lawn Mower	11.0
Gas Walk Behind Mower	33.7
Electric Yard Trimmer	18.2
Gas Yard Trimmer	4.1
Snow Blower	6.7
Chain Saw	19.4
Garden Tiller	10.4

Source: Simmons

Table 5 Four Year Review Of Garden Tiller Ownership

	Owners (000)	% of adults
1983	17,233	10.4
1982	16,675	10.3
1981	14,773	9.3
1980	14,726	9.3

Source: Simmons

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Americans who did not buy flower seeds.

"The 1983 study of media and markets shows that one in five adults bought less than \$5 worth of flower seeds, and one in 10 spent between \$5 and \$49. Vegetable and lawn seed sales are skewed to higher annual sales. Plan your sales promotion budgets and inventory space allocations accordingly.

"Fertilizers show a similar pattern, but lawn fertilizer purchases between \$20-\$49 are at a hefty 9.5 percent (Table 2). That's 16 million people who traded off dinner at a restaurant for green grass.

"Looking further at the Simmons data on lawn care, the buyer profile shows that \$20-plus sales were heaviest in the Northeast, purchased by managers and professionals who are college-educated with incomes of \$40,000 and more.

"By contrast, the profile of 'other fertilizer' purchases—and those in the audience raising cows, horses or chickens will know what we delicately mean by 'other'—are over 50 years old living in the West or central East with low incomes.

Ownership percentages

"Turning to equipment, we find 11 percent owning a riding lawn mower, 33.7 percent a gas-powered walk-behind, 18.2 with an electric yard trimmer, with only 4.1 percent using a more effective gas unit, 6.7 percent are blowing away snow instead of suffering heart attacks while shoveling, 19.4 percent are attacking trees with their chain saws and 10.4 percent tilling their gardens the easy way.

"Ownership of this latter category shows a slow, but constant, growth over the past four years despite the recent recession. People in the north central states constitute the best market for tillers.

"Their homes are in the \$40,000 to \$80,000 range. People with homes in the \$20,000 to \$40,000 range are not far behind in buying tillers.

"I have leaned on the lamp post with some numbers, and I have interpreted some of them to provide illumination about the purchasers. If you have gotten an idea or two about how to size up your prospect as he or she walks in your door, be careful.

"As Mark Twain is reported to have said, 'Any good idea sooner or later leads to work,' and I want to suggest a plan to help you work to sell your market.

"Data I have reported come from Simmons. Manufacturers can usually gain access to these reports through your advertising agencies, and retailers through your Yellow Pages representatives.

"Data are also available in **Lawn & Garden Marketing** and other publications. Analyze national trends against your own sales figures, talk to media representatives who want you to advertise and become your own market researcher.

"Retailers can develop and conduct their own in-store survey and make it worthwhile to the customer to fill it out. By that I mean give them a packet of seeds or a bottle of Rootone for completed questionnaires."



Bruce Butterfield is research director for Gardens for All, and the designer and interpreter of the Gardens for All/Gallup survey.

"Overall, no lawn and garden activity saw a significant increase in popularity among U.S. households between 1982 and 1983. Of the 15

kinds of indoor and outdoor lawn and garden activities measured both years, eight were essentially unchanged and seven saw a small decrease in the percentage of all households participating.

"Lawn care, flower gardening, landscaping, ornamental gardening, fruit trees, berries, nuts and raising transplants were at about the same level in 1983 as in 1982. Indoor houseplants, vegetable gardening, shrub care, controlling insects, pruning, tree care, and edible landscaping all saw small, yet significant, decreases in 1983 (Table 2A).

"The fact that U.S. household population increased from 82.5 million households in 1982 to 84.5 million households in 1983 served to moderate the impact that a lack of growth in the percentage of households participating in lawn and garden activities had on the actual number of households participating (Table 3A).

Identifying avid gardeners

"The lawn and garden participation index rates those demographic groups in the U.S. household population which are more avid lawn and garden participants. It compares the percentage a particular demographic group represents of the 70 million households involved in lawn and garden activities in this country with the percentage that same demographic group represents of the total U.S. household population of 84.5 million.

"Demographic groups that make up a higher percentage of all lawn and garden households than they represent in the total U.S. household population will rate higher than 1.0 on the lawn and garden participation index. These people are the most avid participants in lawn and garden activity in the country and the primary target groups for products and informa-

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tion.

"Groups which rate at 1.0 on the lawn and garden participation index show about average involvement in lawn and garden activity and are of secondary importance to lawn and garden businesses. Demographic groups rating less than 1.0 on the lawn and garden participation index are the least involved in lawn and garden activities.

"The demographic groups rating the highest on the lawn and garden participation index in 1983 were:

- People between 30-49 years of age;
- College educated households;
- Those with professional, business, clerical/sales occupations;
- The Midwest and Pacific states;
- Suburban, small town or rural residents; and
- Upper income households.

Consumer sales index

"The lawn and garden consumer sales index is based on the lawn and garden participation index. It compares the percentage of all retail sales of lawn and garden products made in 1983 by specific demographic groups with the percentage of all U.S. households participating in lawn and garden activities that these same groups represent.

"Households rating higher than 1.0 on the consumer sales index in 1983 spent significantly more per capita and in total on lawn and garden activities than all other groups. Total retail sales of lawn and garden products to people who rate at 1.0 on the index were about equal to the percentage their group represents of all U.S. households participating in lawn and garden activities. Demographic groups that rate below 1.0 on the index had a lower percentage of total sales than their group represents of all U.S. households participating in lawn and garden activities.

"The following demographic groups rated the highest on the lawn and garden consumer sales index in 1983:

- Men;
- People between 40 and 49 years of age;
- College educated households;
- Those with professional or business occupations;
- Households in the South and West;

- Married households;
- Suburban households; and
- Upper income households."



Emanuel Shemin is president of Shemin Nurseries Inc., a joint-venture company with the Weyerhaeuser Corp.

In 1955, Emanuel Shemin perceived a void in the New York metropolitan area to fill the need of nursery and related products for that market. He organized Shemin Nurseries, Greenwich, CT, a unique one-stop shopping distribution center that has grown to include a broad range of hardline and green

custom applicators, and any other trade or institution involved in landscaping or selling to the lawn and garden and landscaping trade.

Shemin, as a panelist, put himself in the place of the retailer, to envision changes retailers may consider to "grow the market." Some of his recommendations:

More competition

- "Increased inter- and intra-industry competition means that more effective promotional activities will be necessary to gain my fair share of the consumer's dollar. There is a real difference between sales and profitable sales. I have learned that I am not selling a commodity based on price, but one based on performance."
- "My customers are more educated about value, quality and service and

Table 1-A
1983 Lawn And Garden Retail Sales

Activity:	Retail Sales (\$ Billions)	% Of Total
1. Lawn Care	3.6	29
2. Landscaping, Tree Care Shrub Care, Ornamentals	3.5	28
3. Flower Gardening	1.8	14
4. Vegetable Gardening	1.8	14
5. Indoor Houseplants	.7	6
6. Controlling Insects	.7	6
7. Fruit Trees/Berries	.5	4
Total	\$12.6	100%

Source: GFA/Gallup

goods products—some 4,000 items in all.

In 1979, Shemin Nurseries entered into a joint venture with the Weyerhaeuser Co. to further expand this unique distribution concept. Subsequently, the Weyerhaeuser/Shemin organization has opened distribution centers in Burtonsville, MD, which services the Washington, DC, and Baltimore areas; Norcross, GA, to serve the Atlanta market; and Addison, IL, to serve the metro Chicago area.

The distribution centers are geared to serve the marketplace with a wider variety of merchandise, and to serve it well beyond what has come to be called the peak of the season.

The customer list includes garden centers, mass merchandisers, landscape contractors, department stores, plant shops, interior landscapers, irrigation contractors,

want them at a competitive price."

- "The increase in two-paycheck households is giving my customers more discretionary income. I must position my business to get my share."

• "My customers have a more positive attitude about their economic position and lifestyle. Their purchasing will be more related to their perception than to their reality. I must market to that optimism."

• "Smaller-size households (in both the number of people and in the physical size of the house and the property) demand different products and services from the industry. I must adjust my product lines to meet these needs."

• "My customers are choosing housing that does not allow them to make the final landscaping decisions (condos, apartments, etc.). I must

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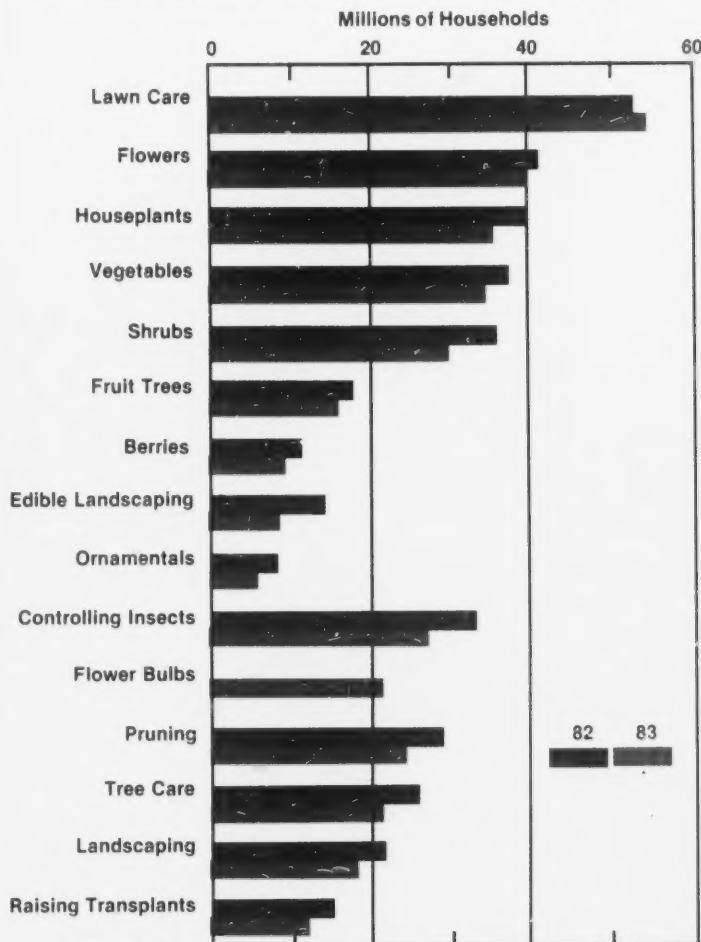
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Table 2-A Lawn and Garden Trendline

1982-1983 Lawn and Garden Activities of All U.S. Households



Source: GFA/Gallup

Table 3-A

% Of All U.S. Households Involved

Lawn and Garden Activity	1981	1982	1983	1981-1983
	%	%	%	% Point Change
Lawn Care	65	63	63	-2
Flower Gardening	47	50	47	0
Indoor Houseplants	51	48	43	-8
Vegetable Gardening	47	46	42	-5
Shrub Care	43	42	35	-8
Controlling Insects in Lawn/Garden/Tree	NA	39	32	-7
Pruning	NA	34	29	-5
Tree Care	NA	30	25	-5
Landscaping	NA	26	23	-3
Fruit Trees	19	22	20	+1
Raising Transplants	NA	18	15	-3
Growing Berries	11	13	12	+1
Edible Landscaping	8	17	11	+3
Ornamental Gardening	7	10	7	0
Nut Trees	5	7	5	0

Source: GFA/Gallup

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Table 4-A 1983 Lawn and Garden Participation Index

	U.S. Household Population		Lawn & Garden Participation		Lawn & Garden Participation Index
	%	MM	%	MM	
Sex					
Male	48	41	49	34	1.02
Female	52	44	51	36	.98
Age					
18-29	27	23	26	18	.96
30-49	34	29	35	24	1.02
50 & over	39	33	39	27	1
Education					
College	30	25	31	22	1.03
High School	55	46	53	38	.96
Grade School	15	13	13	9	.86
Occupation					
Professional	15	13	17	12	1.13
Business	11	9	12	8	1.09
Clerical/Sales	8	7	9	6	1.12
Manual Labor	37	31	36	25	.97
Farmer	3	3	4	2	1.33
Retired	16	14	16	11	1
Other Non-Labor	4	3	3	2	.75
Undesignated	6	5	3	2	.50
Region					
East	27	23	26	18	.96
Midwest	28	23	30	21	1.07
South	28	23	25	18	.89
West	18	15	18	13	1.0

Source: GFA/Gallup

Table 5-A 1983 Lawn and Garden Participation Index

	U.S. Household Population		Lawn & Garden Participation		Lawn & Garden Participation Index
	%	MM	%	MM	
Section					
New England	5	4	5	3	1.0
Mid Atlantic	22	19	21	15	.95
E. Central	18	15	19	13	1.05
W. Central	9	8	11	8	1.22
Rocky Mtn.	4	3	3	2	.75
Pacific	14	12	15	10	1.07
Deep South	8	7	7	5	.88
Rest of South	20	17	19	14	.95
Stage in Life Cycle					
Married, No Children	32	27	34	20	1.06
Married, With Children	32	27	34	19	1.06
Single	21	18	19	11	.90
Separated/ Divorced/Widow	15	13	13	19	.87
Size of Community					
City	32	27	28	20	.88
Suburb	26	22	27	19	1.03
Small Town	15	13	16	11	1.06
Rural	26	22	28	19	1.07
Income					
\$40,000 & over	14	12	16	11	1.14
\$30-39,999	11	9	12	8	1.09
\$20-29,999	19	16	20	14	1.05
\$15-19,999	16	14	16	11	1.0
\$10-14,999	17	14	16	11	.94
\$ 7-9,999	8	7	9	6	1.12
\$ 4-6,999	10	8	7	5	.70
Under \$4,000	6	5	4	3	.66

Source: GFA/Gallup

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compensate for this fact by offering product lines that correspond to this new lifestyle. At the same time, I must understand and develop new markets—the developers of these projects who are making the final landscaping decisions.”

Baby boom gardens

• “The strongest market traditionally for our industry has been a mature market of approximately 45 years of age. Today, I am waiting for the impact of the World War II baby boom to hit that level. I’ve got to develop a strategy for this new market. Two-wage earner families have placed a premium on time and increased the demand for one-stop shopping. This may require me to diversify and expand my product line.”

• “Most importantly, there is an increase in the percentage of non-users of our industry’s products. We must reverse that trend.”

• “We must develop programs and activities to sell our products year-round—maintaining stability in previously slow seasons.”

• “Increased use of industry products in public buildings can be transformed into advertising to increase awareness and results in additional sales.”

• “Increased advertising and promotional expenditure by competitive industries seeking larger shares of consumers’ discretionary income will reduce industry sales unless strategic marketing programs are developed and implemented.”

• “All previous indicated changes will require a more sophisticated, resourceful management of my business. Continued management training in areas of prime need will keep me abreast of the most innovative ideas.” □



Examples of profitable applications of available data by introducing new products or by serving untapped market segments was the topic of Edwin Bobrow, marketing consultant, professor and author, who served

as a panelist on the 1983 and 1984 Executive Forum. His comments on applying the data to today’s marketplace will be presented in November/December.